



Filing ID #10027673

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ben McAdams
Status: Member
State/District: UT04

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2018
Filing Date: 07/14/2019
Period Covered: 01/01/2018– 05/15/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
America First Credit Union [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Citibank Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ AF EUROPAC GROWTH R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ American Funds EuroPacific Growth Fund Class R-6 [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$100,001 - \$250,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID DIVERSIFD INTL K [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$100,001 - \$250,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Cash Reserves IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Commodity Strategies Fund CL S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Emerging Markets Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Freedom 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ Fidelity Freedom 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Equity Class S [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Infrastructure CL S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Opportunities Credit Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Real Estate Securities S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Inflat Prot Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity International Developed Market Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Intl Index Pr [MF]					
Retirement ⇒ Fidelity iShares Core S&P 500 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity Russell Inv Multi Asset Grow Strat S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Small Cap Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Strategic Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity US Small Cap Equity Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity US Strategic Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Main Street All Cap Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Oppenheimer Funds Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Russell Inv Unconstr Total Return Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ SS US BOND INDEX II [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ State of Utah Pension [PE]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ URS BOND FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS INTERNATIONAL FUND [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP GROWTH FUND [MF]		\$100,001 - \$250,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP VALUE FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS SMALL CAP FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG SM GR IDX INST [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Vanguard Institutional Index Fund Institutional Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Vanguard Total Bond Market Index Fund Institutional Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Salt Lake City Rental [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Salt Lake City, UT, US COMMENTS: ADU					
Salt Lake City Rental 1 [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: UT, UT, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Salt Lake rental [RP]	SP	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Salt Lake City, UT, US					
USAA Checking/Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Zions bank accounts [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
University of Utah	Spouse salary	N/A	N/A
Bird Rides, Inc.	Spouse earnings	N/A	N/A
Salt Lake County	2018 salary as Mayor of Salt Lake County	\$5,454.00	\$147,800.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ditech Financial LLC	May 2014	Mortgage on rental property	\$100,001 - \$250,000
	Utah Higher Education Assistance	May 2003	Student loan	\$50,001 - \$100,000
SP	ACS Educational Services	May 2002	Student loan	\$15,001 - \$50,000
JT	Penny Mac	2016	Rental property	\$250,001 - \$500,000
JT	Zions Bank	June 2018	Personal mortgage	\$500,001 - \$1,000,000
JT	Deseret First Credit Union	September 2018	Vehicle loan	\$10,000 - \$15,000
JT	Salal Credit Union	December 2018	Loan for the cost to install solar panels on personal residence	\$15,001 - \$50,000
JT	Cenlar Bank	March 2019	DC studio apartment personal residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Salt Lake Chamber of Commerce/Downtown Alliance
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Envision Utah
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	World Trade Center Utah
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Utah Technology Council
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	United Way of Salt Lake
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Shelter the Homeless
Board Member	Sundance Utah Advisory Board
Board Member	Utah Community Action
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Women's Leadership Institute
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Kem C. Gardner Policy Institute Advisory Board
COMMENTS: Resigned from board upon becoming a Member of Congress.	
Board Member	Sorenson Policy Innovation Lab

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2010	Myself and the State of Utah	Pension

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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- Retirement

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Ben McAdams , 07/14/2019